



Harvard-HUCTW Education Fund Application Guidelines



In 1989, the University and HUCTW Education and Career Development Negotiations Table spent a great deal of time discussing the institutional as well as personal benefits of support staff pursuing educational interests. We worked together to set up a fund which would assist several different educational and career development needs. The Education Fund is designed to address those needs, as well as to increase the opportunities for support staff to pursue further education. We believe that the fund will help to incorporate education into a broader view of what career development means for support staff and how it fits into plans for our own lives.

Eligibility

The following must be met in order to be eligible for an Education Fund award:

- 1) You must be part of the HUCTW bargaining unit.
- 2) The course must fit the award criteria.

Award Criteria

The Education Fund primarily covers courses not eligible for reimbursement under the University's Tuition Assistance Program (TAP) and Tuition Reimbursement Program (TRP). Courses eligible for the Education Fund include:

- 1) a test preparation course (*for example: a GRE prep course*)
- 2) a conference/seminar (*the reimbursement will only consider the cost of tuition, not transportation, room or board*)
- 3) any other course that is not eligible for TAP/TRP (*for example: auditing a course, taking a course at an institution that does not offer a degree or certificate such as a cooking course at an adult learning center, taking a course for a professional accreditation or paying membership fees in a professional association. Please note that fitness courses, and courses offered at Harvard are not eligible for reimbursement*)

The Education Fund and TRP

All non-Harvard graduate or undergraduate courses taken for credit towards a degree are reimbursed through TRP and not the Education Fund. The only circumstances under which TRP eligible courses will be considered for an Education fund award are:

- 1) You have not yet passed your Orientation and Review Period.
- 2) You did not receive a passing grade for the course.
- 3) You have "tapped out" or in other words, you have exhausted your \$5250 per calendar year TRP limit. Please note that you must completely use your TRP allowance before applying to the Education Fund. In order to prove you have exhausted your funding for the year, please include a copy of the "Explanation of Tuition Claim Action" form you receive from Crosby along with your TRP reimbursement or a print out from your Crosby Benefit online account documenting your exhaustion of the \$5250 limit.
- 4) If you are approaching your \$5250 limit and therefore your course costs will be reimbursed at less than 90%, you are eligible to receive a reimbursement of 50% for the remainder of your costs not covered by TRP.

Application Procedure

HUCTW members are eligible for an award for one course (conference/workshop/membership/etc) per semester. The deadlines for application:

Fall Semester: January 25th

Spring Semester: June 10th

Summer Semester: September 10th

You must apply to the application deadline closest to the completion date of the course you wish to have reimbursed. If the course you are taking is more than a semester long you will be eligible to apply for the award only upon completion of the course.

Fill out the entire application form. Your application must include the following information to be considered complete:

- 1) Course Description (photocopy/print out from the course catalog/website is fine)

- 2) Tuition Information--this must include **both**:
 - a) receipt of payment or similar payment documentation, AND
 - b) itemization which shows the cost of the course for which you are seeking reimbursement (can be a photocopy from the catalog of cost per credit or per course, or itemization which is shown on the receipt).
- 3) Grade or Completion Document. (A printout of an unofficial transcript from the internet is fine. If a program does not give out grades, a completion certificate or a letter from the instructor attesting the student completed the course will be considered proof of completion.)
- 4) Proof of TRP Reimbursement. If your course is eligible for a TRP reimbursement, please provide a copy of the "Explanation of Tuition Claim Action" form you received from Crosby along with your TRP reimbursement or a print out from your Crosby Benefit online account documenting your exhaustion of the \$5250 limit.

All materials must be submitted (via U.S. mail, University Mail or by fax) to:

HUCTW Education Fund
15 Mount Auburn St
Cambridge, MA 02138
Fax # 617-661-9617

Materials may also be emailed to huctw.edfund@huctw.org

Please note that your application will not be processed until it is complete.

Confirmation of Application Receipt

Soon after the application deadline we will send email messages to all applicants confirming receipt of their applications. This email is sent to your Harvard email account. If you have another address that you would like us to use, please note it on the application. Additionally, if you do not receive an email from the Education Fund within a month after the application deadline, please contact us to ensure we received your application.

Amount of Awards

The amount of an award will be calculated based on the applicant's out-of-pocket cost for course tuition. All eligible applicants will receive a reimbursement of 50% of tuition, minus your TRP reimbursement where applicable. We encourage everyone who is eligible to apply.

Notification of the Award

All applicants will be notified in writing whether or not they have received an award. Notification will be via email a few weeks after the application deadline or as soon as the Selection Committee can make its determinations of the awards.

Payment of the Award

Awards are delivered in your Harvard paycheck, are taxable as extra compensation, and the tax due will be withheld at the time of reimbursement. You should see your award in your paycheck within two weeks of when you were notified of your award.

For further information regarding the Education Fund you can email us at: huctw.edfund@huctw.org or call the HUCTW office at **617-661-8289**.